



Financial Services Guide – Part 2

Version number 25.1, 6/8/2026

This FSG Part 2 contains information specific to your Adviser and their firm and should be read together with the FSG Part 1, Version Number 25.0, which contains information about the AFS licensee and their general obligations and arrangements. Count Financial Limited (Count'), has authorized your adviser to distribute this FSG.

The financial services provider

Your Adviser is authorized to provide financial services as:

An authorised representative of Count AFS licence no. 227232, ABN 19 001 974 625, authorised to provide the financial services described in this FSG through BWC Wealth Partners, ABN 65618 823 000. ASIC ID number 001000232

Referral arrangements

Please refer to FSG Part 1, for further information on other relationships that might influence Count in providing financial advice services, we will also disclose any associations or conflicts in the Statement of Advice that we prepare for you.

Fees

These fees should be considered a guide only. We will discuss your individual needs and agree our fees with you before we provide advice. The actual agreed fees will depend on the complexity of your circumstances, goals and needs and the scope of advice we provide. Please note that fees may be higher than those outlined here if mutually agreed upon. The indicative fees we charge are set out below:

Advice Preparation and Implementation fees:	The fee for the preparation and implementation of our advice is calculated as follows ○ Our minimum fee is \$5,500 ○ Our maximum fee is \$24,500
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Supplementary Service Fees:	For supplementary services, such as the provision of general research material or the completion of administrative tasks, our fee will be calculated on a time basis of \$400 per hour.
Ongoing & Fixed Term Service Fees:	These are the fees you pay when you agree to receive our ongoing or fixed term advice. Our services will be agreed with you in a Client Service Arrangement. Our minimum fee is \$3,300
Non-advised Transaction Fees:	If we assist you on an execution only basis (ie where you have been offered and declined advice), a fee of up to \$400 per hour will be applicable.

Note: All fees are inclusive of GST.

Our contact details

Stephen Crowe CFP®
BWC Wealth Partners

Phone: 03 4513 1177

Website: bwcwealth.com.au

Email: enquiries@bwcwealth.com.au

Office Address: 36 Gawler St, Portland VIC 3305

Our Privacy Collection Statement

We collect personal information about you (and, if applicable, anyone acting on your behalf) to help us provide financial services that are suited to your needs, to manage our relationship with you, and to meet our legal obligations under the Privacy Act 1988 and the Corporations Act 2001.

This statement forms part of our broader Privacy Policy, and together they make up our formal notice under Australian Privacy Principle 5.

Why we collect your information

We need certain information to understand your financial situation and provide appropriate advice or services. The specific information we collect will depend on who you are and the nature of the services you need.

If you choose not to share some details, or if the information is incomplete or inaccurate, it may limit our ability to provide advice or services to you, or we may not be able to proceed at all. It could also mean that the advice you receive is less tailored to your situation. In some cases, we may need to end our relationship if we cannot properly meet your needs.

Who we may share your information with

To deliver our services, we may need to share your information with:

- Product and platform providers
- External service providers (e.g. paraplanners, IT providers)
- Other professionals you've authorised us to work with (e.g. your accountant or tax adviser)

BWC Wealth Partners may engage the services of external services providers both here and overseas who supply administrative, financial or other services to assist us to provide financial and services to you.

- We note that at this stage we do not engage overseas suppliers.

Sharing information overseas

Some service providers we use may be located overseas or have operations outside Australia. Your personal information might be stored or accessed in these countries. We take reasonable steps to make sure your information is protected and handled in line with the Australian Privacy Act.

For more information about which countries your information may be sent to, please refer to Count's [Privacy Policy](#) or contact us directly. If you do not wish for your information to be transferred overseas, please let us know.

Accessing or correcting your information

If you think any of the details that we hold are incorrect or out of date, please contact us to correct this. You can ask to access or correct your personal information at any time by contacting us.

A copy of our Privacy Policy is on Count's website www.count.au. We can also send you a copy if you contact us.

ADVISER PROFILE

About Stephen Crowe CFP®

The Authorised Representative number for Stephen Crowe is 001000232 and their details are available on the [Financial Advisers Register](#).

What experience does the adviser have?

Stephen has over 26 years of experience in the provision of financial planning advice.

Stephen attained a Bachelor of Commerce from Deakin University in 1999 and is a Certified Financial Planner® as well as being a long standing member of the Financial Advice Association of Australian. (FAAA).

Stephen has achieved additional accreditation in *Self Managed Superannuation Funds* and specializes in providing strategic investment advice with focus on retirement planning.

What qualifications has the adviser completed?

Qualification Name
Stephen holds a Bachelor of Commerce from Deakin University.

Stephen holds the decorated Certified Financial Planning® designation from the FAAA.

What products and services can the adviser provide?

Stephen Crowe is authorised to provide the following products and services:

- Basic deposit products
 - Life insurance
 - Government debentures, stocks and bonds
 - Managed investment schemes
 - Retirement Savings Accounts
 - Securities
 - Superannuation
 - Standard margin lending
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What other associations and relationships does the adviser have?

Marcus Walsh CPA is a Director of BWC Wealth Partners. Marcus Walsh is a Director of Walsh Accounting Portland – a South West Victoria based accounting practice.

Dean Brewster CA is a Director of BWC Wealth Partners. Dean is a director of NSC Advisory- a South West Victoria based accounting practice.

Those entities are separate corporate entities, and Stephen Crowe has no directorship or ownership of either.

How will your financial adviser be paid for the services provided?

All fees and commissions disclosed in the FSG which are attributed to the services provided to you by your adviser are paid to Count who will pay up to 100% of those fees and commissions to BWC Wealth Partners, may pass on up to 100% of those fees and commission to Stephen Crowe.

Stephen Crowe is a Director of BWC Wealth Partners and is remunerated through the payment of salary and bonuses.